

### **Attachment A: Instructions to Offerors**

**SUBMISSION:** The Offeror's quote shall be submitted electronically in the files set forth below by the date and time indicated in the solicitation. Quotes submitted by any other method will not be considered. The Offeror's quote shall consist of three Volumes. The Volumes are I – Technical (including Personnel), Volume II - Past Performance, and III - Price. Files shall not contain classified data. The use of hyperlinks or embedded attachments in quotes is prohibited. All proprietary information shall be clearly marked. File sizes shall not exceed 5MB. The electronic addresses for the delivery of quotes is by email to [anne.cardenas@va.gov](mailto:anne.cardenas@va.gov) and [anthony.balestreri@va.gov](mailto:anthony.balestreri@va.gov). All quotes are due by **September 19, 2014 at 5:00 PM EST.**

**QUESTIONS:** All questions shall be submitted by email to [anne.cardenas@va.gov](mailto:anne.cardenas@va.gov) and [anthony.balestreri@va.gov](mailto:anthony.balestreri@va.gov) by **September 17, 2014 at 5:00 PM EST.**

**Quote Files:** Offeror's responses shall be submitted in accordance with the following instructions:

**A. Format:** The submission shall be clearly indexed and logically assembled. Each Volume shall be clearly identified and shall begin at the top of a page. All pages of each Volume shall be appropriately numbered and identified by the complete company name, date and solicitation number in the header and/or footer. Quote page limitations are applicable to this acquisition. The Table below indicates the maximum page count for each volume of the Offeror's quote. All files will be submitted as either a Microsoft Excel (.XLS) file or an Acrobat (PDF) file or compatible as indicated in the table. Page size shall be no greater than 8 1/2" x 11". The top, bottom, left and right margins shall be a minimum of one inch each. Font size shall be no smaller than 12-point. Arial or Times New Roman fonts are required. Characters shall be set at no less than normal spacing and 100% scale.

**B. File Packaging:** All of the quote files may be compressed (zipped) into one file entitled "quote.zip" using WinZip version 6.2 or later version or the quote files may be submitted individually.

**C. Content Requirements:** All information shall be confined to the appropriate file. The Offeror shall confine submissions to essential matters, sufficient to define the quote and provide an adequate basis for evaluation. Offerors are responsible for including sufficient details, in a concise manner, to determine each quote and their ability to perform the tasks. The titles and page limits requirements for each file are shown in the Table below:

Volume Number and Title	Page Limit
Volume I – Technical	25 pages (all resumes in this volume, limited to 2 pages. Not included in 25 page limit)
Volume II – Past Performance (see Attachment A)	6 pages maximum, 2 pages for each project
Volume III – Price	Unlimited

The Title Page, Table of Contents and/or a glossary of abbreviations or acronyms will not be included as part of the page count. However, be advised that any and all information contained within any Title Page, Table of Content, and/or glossary of abbreviations or acronyms submitted with an Offeror's quote will not be evaluated by the Government. See also FAR 52.212-1, Instructions to Offerors – Commercial Items.

Evaluation factors are listed in descending order of importance. Subfactors within evaluation factors are equal with no order of importance:

## **EVALUATION FACTOR - 1: TECHNICAL**

### **TECHNICAL SUBFACTOR 1: KEY PERSONNEL**

The Offeror's quote shall be evaluated on information that demonstrates adequacy of their proposed personnel. The quote shall clearly demonstrate the proposed personnel's in-depth knowledge of public and/or Department of Veterans Affairs (VHA) health care delivery, public, private and VHA healthcare revenue operations or provide strong indications of the ability to rapidly assimilate such knowledge.

**1. Key Personnel:** Certain skilled experienced professional and/or technical personnel are essential for accomplishing the work to be performed. These individuals are defined as "Key Personnel" and are those persons whose resumes were submitted and marked by the vendor as "Key Personnel". Resumes must be provided for all proposed "key personnel."

**2. Contractor Personnel Requirements:** The contractor must demonstrate knowledge and experience in the following: healthcare revenue, healthcare finance, risk management, quality management, project and program management, and knowledge management.

The Contractors shall present domain knowledge of healthcare revenue, healthcare finance, risk management, quality management, project and program management, knowledge management, expert knowledge and experience in the development of business requirements utilizing Six Sigma DMAIC (Define, Measure, Analyze, Improve, Control). The contractor shall also have an in depth knowledge of health care revenue cycle processes in addition to the following: knowledge and experience in design and development within a SharePoint 2010 environment, specific knowledge of project management, expert knowledge of project management; certified in project management professional (PMP) from Project Management Institute, expert knowledge executive level communication development and presentation.

The following labor categories (or Offeror's equivalent) are considered Key Personnel. The Key Personnel proposed shall have an in-depth knowledge of the following:

### **Project Manager**

Expert level serving in a lead capacity, with enterprise-wide knowledge managing multiple complex projects in one or more areas of business modeling, process flow modeling, performance metrics, business management, budgeting, training, strategic planning, requirements development, and organizational performance support. Senior level required to develop and articulate critical case assumptions, recommendations and conclusions and to compose and present successful project deliverables. Demonstrated ability analyzing problems, defining solutions, communicating recommendations, developing procedures, building consensus with the client, providing implementation direction, and developing and managing work plans. Possesses and presents excellent presentation skills, written and verbal communications skills across multiple levels of leadership.

### **Lead Analyst**

On-sight, expert level with the ability to perform multiple complex projects in one or more areas of business modeling, budgeting, training, commercial medical care revenue-cycle processes and performance metrics. Expert level provides unique insight, business analysis utilizing end-user tools, documentation, data mining, evaluation and recommendations for improvements, optimization, development, and/or maintenance efforts, and project management methodology consistent with both the Project Management Body of Knowledge (PMBOK) and Business Analysis Body of Knowledge (BABOK) guidelines and principles. Able to define concepts and insights regarding the applicability of best industry practices. Expert brings demonstrated ability to participate in project activity at the individual, team member and/or management level. Must possess a strong working knowledge of modeling techniques such as those found in the Unified Modeling Language (UML) standard. Possesses and presents excellent presentation skills, written and verbal communications skills across multiple levels of leadership. Individual should have a working knowledge of requirements management and tracing software such as the Rational Suite of Tools.

### **E-Learning Specialists / Technical Writers**

On- sight expert level with the ability to support multiple complex projects in the areas of e-learning segments/and products. Must be proficient in use of Adobe Captivate 5 and other Adobe products such as Acrobat, Flash Builder, RoboHelp8, Microsoft Office 2007 (word/access/excel/PowerPoint), SnagIt, and other graphical capturing software. Must possess great attention to detail flexibility and adaptability along with exceptional writing, grammatical and punctuation skills; a formal degree in the areas of other English, Journalism, Technical Communications or Computer Science is preferred. The individual should have experience in a training environment that includes interview/facilitation skills that achieve end to graphical representations to define business standards and techniques.

The Contracting Officer may notify the Contractor and request immediate removal of any personnel assigned to the task order by the Contractor that are deemed to have a conflict of interest with the government or if the performance is deemed to be unsatisfactory. The reason for removal will be documented. If removed, "Key Personnel" will be replaced within three (3)

business days. The Employment and staffing difficulties shall not be justification for failure to meet established schedules.

**Substitution of Key Personnel:** All Contractor requests for approval of substitutions hereunder shall be submitted in writing to the COR and the Contracting Officer at least thirty (30) calendar days in advance of the effective date, whenever possible, and shall provide a detailed explanation of the circumstances necessitating the proposed substitution, a complete resume for the proposed substitute, and any other information requested by the Contracting Officer necessary to approve or disapprove the proposed substitution. New personnel shall not commence work until all necessary security requirements, as defined in Section J, have been fulfilled and resumes provided and accepted. The COR and the Contracting Officer will evaluate such requests and promptly notify the Contractor of approval or disapproval in writing.

The Contractor shall be responsible for managing and overseeing the activities of all Contractor and subcontractor personnel, used in performance of this effort. The Contractor's management responsibilities shall include all activities necessary to ensure the accomplishment of timely and effective support, performed in accordance with the requirements contained in the performance work statement.

#### **Staff Qualifications.**

##### **Project Manager**

Minimum Education Level: Master's degree in related field or equivalent.

Minimum Experience: 6 years' experience with commercial with enterprise-wide knowledge managing multiple complex projects in one or more areas of business modeling, process flow modeling, performance metrics, business management, strategic planning, requirements development, and organizational performance support .

##### **Lead Analyst**

Minimum Education Level: Bachelor's degree in related field or equivalent.

Minimum Experience: 4 years' experience with business analysis utilizing end-user tools, documentation, data mining, evaluation and recommendations for improvements, optimization, development, and/or maintenance efforts, and project management methodology consistent with both the Project Management Body of Knowledge (PMBOK) and Business Analysis Body of Knowledge (BABOK) guidelines and principles.

##### **E-Learning Specialists / Technical Writers**

Minimum Education Level: Bachelor's degree in related field or equivalent.

Minimum Experience: 4 years' experience with education development and training.

## **TECHNICAL SUBFACTOR 2: TECHNICAL CAPABILITY - MANAGEMENT METHODOLOGY**

The Offeror's quote shall be evaluated for its detailed discussion and Offeror's approach to proposed solution(s) and demonstrated ability to perform the type of work described by this PWS, and the qualifications of the offeror's technical expertise management approach as follows:

- Understanding the Requirement: Technical quote shall clearly demonstrate an understanding of the requirements, the context and the scope of the project.
- Methodology: Technical quote shall clearly demonstrate approach to management of technology problems and methodology.
- Appropriateness/Completeness: Technical quote shall be complete and specific to the tasks

## **EVALUATION FACTOR - 2: PAST PERFORMANCE**

The Offeror shall demonstrate successful past performance by providing recent and relevant past performance information on up to three (3) contracts, for work completed within the past three years, concerning previous history and completion of similar scale (size and scope) projects within the same time and cost estimates. Include the following information for each contract and subcontract listed:

- Name of the Contracting Agency
- Contract Number
- Contract Title
- Brief description of contract/subcontract and relevance of this requirement
- Total contract value
- Contract Type
- Period of Performance
- Contacting Officer and valid telephone number
- Program manager, project officer, or COR and valid telephone number

The Government may also consider information obtained through other sources. Past performance information will be utilized to determine the quality of the contractor's past performance as it relates to the probability of success of the required effort.

The past performance evaluation shall take into consideration the most recent data available. The purpose of the evaluation is to make a performance confidence assessment of the Offeror's ability to perform the effort described in the solicitation. This assessment represents the Government's judgment of the probability of the Offeror successfully accomplishing the proposed effort based on the Offeror's demonstrated past performance history. The government reserves the right to contact the provided points of contact to inquire about past performance efforts as well as check the Contractor Performance Assessment Reporting System (CPARS) for past performance information. See Attachment B for a sample of the questions that may be asked to past performance points of contact.

### **EVALUATION FACTOR – 3: PRICE**

Pricing for this task order shall be Firm Fixed Price. Price shall be presented separately from the Technical quote and Past Performance. Additionally, all offerors shall fill out Attachment C\_VA777-14-Q-0244 Pricing Schedule.

Quotations which are unrealistic in terms of technical commitment or unrealistically low in price will be deemed to show an inherent lack of technical competence or failure to comprehend the complexity and risk of the requirements. This may be grounds for the rejection of the quotation. The Government may reject any quotation that is unreasonable or materially unbalanced as to prices. An unbalanced quotation is one that incorporates prices significantly less than cost for some items and/or prices that are significantly overstated for other items.

**G. Evaluation:** Quotes will be evaluated based on three factors: technical, past performance, and price.

Quotes will be evaluated based on three factors: technical, past performance, and price where technical is more important than past performance and when combined, technical and past performance are significantly more important than price. Subfactors under the technical factor are key personnel and technical capability – management methodology. These subfactors are of equal importance.

Note: Do not submit your company's general marketing literature or brochures. Such materials are not considered responsive to the specific evaluation criteria and shall not be evaluated by the board.